Children's Bookselling: The Trend's Still Up

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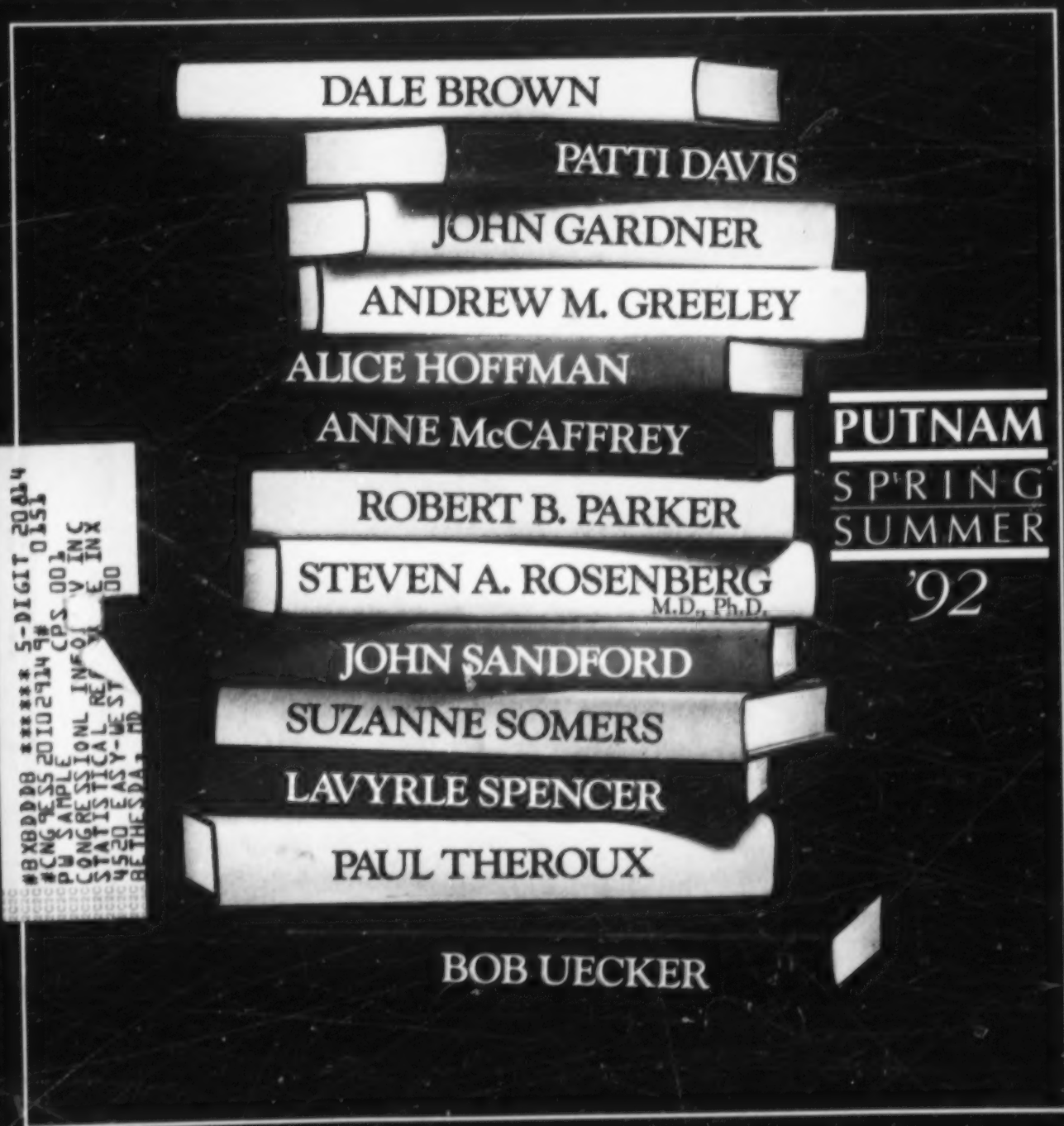

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ABA Move Hits Snag; Switch To Different Tarrytown Site

The American Booksellers Association has been unable to close on the property it has sought to purchase in Tarrytown, N.Y., the former site of World Publishing Co.

Because it sold its office condominum in New York City and had to vacate the space by the end of the year, the ABA has moved instead to temporary office space in Tarrytown, reportedly in a building occupied mostly by the IBM Corporation, which has headquarters in nearby Armonk. The space, which it is renting for a year with a one-year renewal option, consists of 12,900 square feet, less than the 13,200 square feet the ABA previously had in Manhattan.

ABA president Joyce Meskis declined to elaborate on what was holding up the purchase because negotiations "are still under way." She said that "it's business as usual for us," and that the association believes "there is plenty of lead time" before the annual convention, in Anaheim, Calif., May 23–26, to settle into place. Some ABA employees have not made the move. Meskis called staffing levels "still quite adequate" and said that the association has begun interviewing to fill the slots.

Under original plans, the ABA had planned to move into the mansion on the Tarrytown site for a minimum of six months while renovations were made on the office space on the site. At the ABA membership meeting last June, executive director Bernie Rath said that the property had three buildings, including a warehouse, and was priced at $3.35 million. —JOHN MUTTER

Commerce Dept. Predicts 3% Growth in Book Industry for '92

Further proof that the book publishing industry appears to benefit from recessions is being offered in the Commerce Department's 1992 industrial outlook.

During an entire calendar year of recession in 1991, the book industry grew by 2%, it said—enough to place it 63rd among 128 selected industries the department ranked by increases over the previous year.

Although the book industry growth was less than the 3% forecast in last year's outlook, that forecast had anticipated an early end to the recession. Similarly, the outlook anticipates "a recovered U.S. economy" and thus again predicts a 3% increase in growth in 1992.

As in 1991, the forecasters expect trade publishing to carry the ball for other segments of the industry, particularly textbook publishing, which has been suffering from reduced spending budgets by state governments.

William Lofquist of the Office of Consumer Goods, who prepares the book publishing segment of the outlook, expects an expanding 5–14 age group to lead to an increase in shipments of children's books, and improved economies abroad to result in an increase in exports, particularly of technical, scientific and professional books.

Looking long-term, Lofquist expects the industry to continue experiencing a 3% increase in shipments each year through 1996, generated by "higher levels of disposable personal income, more book outlets and general population growth." —HOWARD FIELDS

AAP Sales Report for November

Category	% change, November*	% change, YTD
Adult hardcover	12.2	6.2
Adult paperback	23.7	7.4
Juvenile hardcover	26.3	12.5
Juvenile paperback	20.2	18.4
Univ. pr. hardcover	-11.3	4.5
Univ. pr. paperback	-10.6	7.0
Bibles, etc.	-29.5	23.8
Mass market paperback	15.7	9.7
Book club	4.7	4.1
Mail order	-9.4	-1.9
Sci-tech	1.1	0.8
College texts	-0.7	-0.8
School texts	-3.5	2.5

**Percent changes measured against same time periods, 1990.*

New Random House Incentive Plan for Wholesalers

Random House Trade division will implement a new sell-through incentive program for wholesalers beginning January 1.

All adult hardcover, trade paperback and large print returns received at the Random House warehouse after January 17 will be credited at 53% regardless of when and at what discount the titles were purchased. Wholesalers will receive a rebate of 1.25% of gross purchases of these titles when they achieve a returns percentage for the calendar year 1992 of less than 30%.

AAP to Step Up Watch On Copying Shops

Emboldened by the $1.9 million settlement in its suit against Kinko's Graphics Corp. of New York, the Association of American Publishers has announced plans to step up copyright enforcement at copyshops around the country.

The association said it has analyzed the contents of many anthologies used in college courses to identify "questionable anthologies" comprised of material that was photocopied without permission of the publisher.

As part of the second phase of its enforcement effort, it said, the AAP board has authorized the organization to begin contacting infringing copyshops and asking them to pay a royalty and to agree to stop copying "multi-page excerpts of copyrighted materials without obtaining prior permission" or face a possible lawsuit.

Nicholas Veliotes, AAP president, said the goal of the organization "is not to discourage the use of college-course anthologies, but to discourage anthologizing without consent." —H.F.

Illustration: Valerie Pizzo

Special Children's Bookselling Survey

In Space, Titles, Sales, The Trend Is Still Up

BY DIANE ROBACK

In a survey conducted by Cahners Publishing's research department in October 1991, questionnaires were sent to 936 Publishers Weekly *subscribers and 425 bookstore members of the Association of Booksellers for Children. There were 399 respondents in all, for a response rate of 29%. We followed up the survey with a telephone poll, talking with booksellers about some of the issues the survey raised.*

Of the bookstores that participated, 41% are general independents, 22% are children's-only stores, 11% are specialty independents, 10% are college or university stores, 5% are national or regional chains, and 11% answered "other" or did not specify.

In an arid landscape of recession, heavy returns and cautious projections, children's book publishing provides a refreshing oasis. Maintaining an unprecedented growth spurt that began in the early 1980s, children's books have continued their success in the retail arena: with more and more children's-only bookstores opening their doors, with existing stores expanding and adding locations, with general and chain bookstores enlarging their children's sections.

The amount of space that children's books occupy in children's-only stores continues to rise, to a mean of 1304 sq. ft., up from 1181 sq. ft. in 1990 and 1099 sq. ft in 1989. This new figure represents an average of 88.8% total selling space, with the remaining 11.2% of space devoted to audiotapes, toys and other sidelines. General independent stores devote an average of 439 sq. ft. to children's books, or 19.2% of their total selling space. On average, chain bookstores devote 569 sq. ft. to children's books (15.2% of total space), and college/university stores devote an average of 266 sq. ft. to children's books (8.9% of total space).

On average, children's-only stores had total gross sales and revenues for children's books in 1990 of $211,080. Using the 1990 average figure of 1181 sq. ft. per store, this means that sales of children's books in these stores averaged $179.3 per sq. ft. in 1990. Gross sales of children's books in general/specialty stores in 1990 were $64,375; for national/regional

***Telephone research** was provided by Maria Heidkamp, Janet Schnol and Bella Stander.*

chains, the figure was $110,356.

Children's-only stores carry an average of 7901 individual titles; general/specialty independents carry 2739 children's titles, college/university stores carry 1754, national chains carry 1893 and regional chains carry 2751. For slightly over 80% of the children's-only stores, this number represents an increase over the last 12 months, while 63.2% of the general/specialty stores and 56.3% of the college/university stores report an increase. Chain bookstores are the only category in which the majority of stores (52.4%) did *not* increase the number of children's titles carried.

Why the continued increase? Demand is still strong, retailers tell us, from customers as well as from teachers, and the supply of new books is ever-growing. "We keep increasing our stock," says Elsie Peterson, manager of Pooh's Corner/Baker Book House in Grand Rapids, Mich., "and our sales keep increasing. We haven't reached the saturation point yet."

For stores carrying more children's books during the last year, the percentage of increase was quite similar for all types of stores: 19% for children's-only stores, 18.7% for general/specialty independents, 16.4% for college/university stores, 16.6% for national chains and 20% for regional chains. Smaller stores increased the number of titles carried at a higher rate: 20.1% for stores with annual gross sales below $500,000, compared to 15% for stores grossing above $500,000. The majority of children's stores (55.7%) project a further increase in titles carried during the coming year, as do 46.8% of general/specialty stores, 50% of national chains, 36.4% of regional chains and 37.5% of college/university stores.

Dana Dragani, manager of merchandising and specialty programs for Waldenbooks, describes some of the factors involved in deciding how much space to devote to children's books: "The price points of children's books are relatively low," she says, "so when you're comparing the whole store, the dollars and cents don't warrant the space. But in units it does. The price point of a $2.25 board book doesn't compare to a $5.95 mass market book, yet they take up the same amount of space. If you're going to be committed to children's books, you have to bite the bullet and give them the space even if the dollars don't call for it. And it pays off—the more you expand, the more you sell."

The Heart of the Business

It's an undisputed maxim that backlist is the heart of the children's book business. Most of the bestsellers for publishing houses are older titles—10, 20, even 50 years old. Bookstore customers want the classics, the titles they remember from childhood, no-risk choices. This is reflected in the ratio of backlist to frontlist titles stocked by stores. Children's bookstores carry 75.9% backlist/24.1% frontlist; for general/specialty stores, the breakdown is 68.9%/31.1%; for chains, 70.7%/29.3%; and for college/university stores, 62.2%/37.8%.

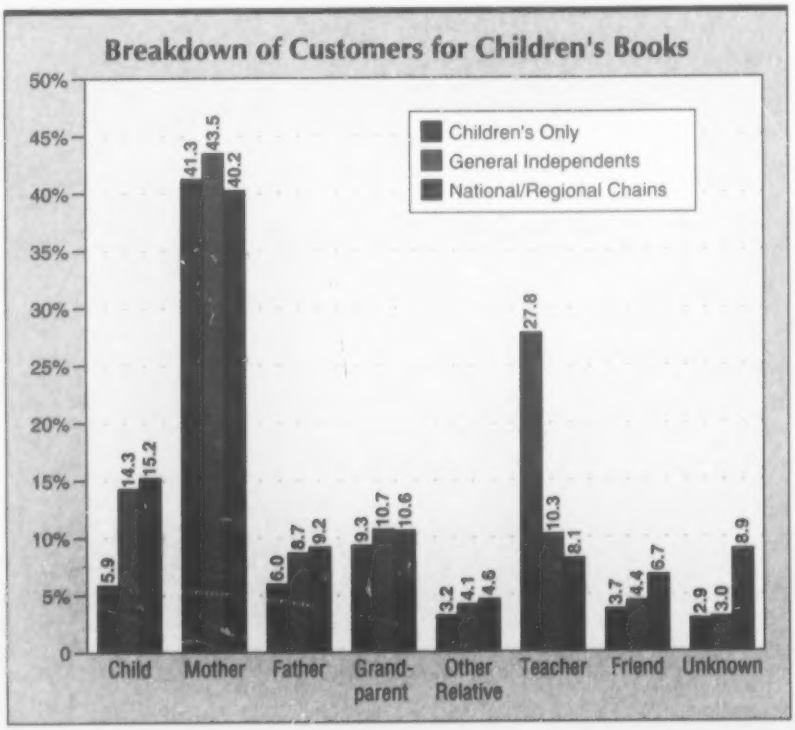
Backlist may be primary, but children's booksellers insist that frontlist is essential to their operations as well. "As a specialty store," states Rosemary Stimola of A Child's Story in Teaneck, N.J., "you can't just present backlist. You have to provide a broader spectrum to the public—books that are different or unique or odd. It's not *Goodnight Moon* that's going to distinguish my store from any other."

As children's book sales continue to grow, and as publishers offer more frontlist, retailers are becoming increasingly selective as to the number of new titles they buy per season. "We all only have just so much space," says Sandi Gurowski, owner of The Children's Pages in Winooski, Vt. "So we all must make decisions about books that deserve to have space. Sometimes we have to send them back to make room for the new ones." Like many of her colleagues, Joyce Peters of Giant Steps in Fremont, Calif., feels a responsibility to give new books a chance: "You can't really dump a good title. You need to hold onto it and help it develop a following."

At the Children's Bookshop in Clifton, Va., owner Linda Kostrzewa's solution is to buy fewer copies of each new book. "I'm constantly looking for shelf space," she says. "I've ended up rotating my stock like a farmer does with crops." Dragani at Waldenbooks observes, "The number of titles that pass my desk on a yearly basis is mind-boggling. I can't just say, 'This is a nice book, I think I'll take it.' To fill the shelves of an average Waldenkids—2200 sq. ft.—I just buy the books that blow me away or I'm sure will sell like crazy. There are just so many phenomenal titles that the 'nice' books have to go by the wayside."

Children's stores also carry a higher ratio of hardcovers to paperbacks than any other category of store: 47.7% hardcovers to 52.3% paperbacks; for general/specialty stores it's 37.7%/62.3%, for college/university stores, 42.8%/57.2%, and for chain stores, 40.5%/59.5%. Though hardcover picture books remain a strong sales category, booksellers in the survey repeatedly said that their customers prefer paperbacks and are increasingly waiting for new books to come out in softcover.

The average length of a customer's visit to a children's bookstore is 24 minutes, compared to 18 minutes for all other categories of stores (see chart, page 28). While many chil-



dren's booksellers think that figure sounds "about right," others, like Peterson of Pooh's Corner/Baker Book House, believe that this average covers a wide spectrum of visits. "Some people spend several hours," she points out, "and some walk in and know exactly what they want." And store visits are often significantly longer during the holiday season.

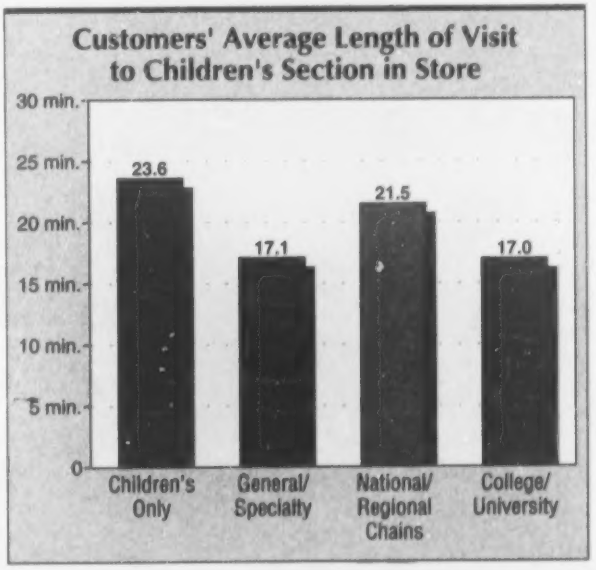
Our survey reveals that the average dollar purchase is much higher in children's-only stores: $23.38 per purchase, compared to $13.90 for all other categories of stores (see chart, p. 28, for breakdown). The average number of books purchased is highest in children's stores as well: 3.5 per visit, vs. an average of 2.9 for all other stores (see chart, p. 28).

"Can I Help You?"

In both the Cahners survey and the telephone poll, booksellers stress the importance of handselling in the purchase of children's books (see chart, p. 29). More than half (52.7%) of the books purchased in children's-only bookstores are handsold, vs. 33.2% of the children's books bought in all other types of stores. Though these findings are not surprising, they do indicate the additional knowledge of stock and involvement with customers in children's stores that other types of stores can't match. Handselling is also more important for smaller stores; in those with annual sales below $500,000, 43% of the children's books purchased are handsold, compared to 27% in stores with annual sales above $500,000.

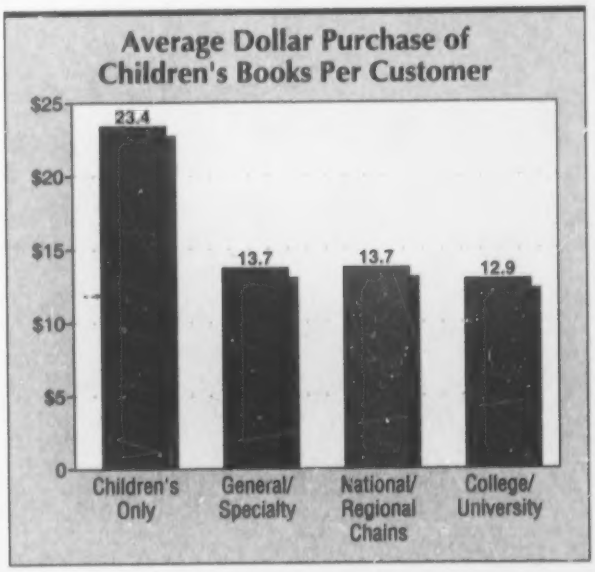
Since there are so few avenues of information on new children's books for consumers, people shopping in a children's section often request older, familiar titles. "They're confused by the new ones," says Gurowski of The Children's Pages. "That's why it's very important to have knowledgeable staff who read the books and can offer help." Susan Durrie, co-owner of The Children's Corner Bookshop in Spokane, Wash., finds that "customers aren't reluctant to say, 'Can you help me?' They're usually buying for someone else and they haven't been a child in a while, so they are very insecure in making selections. Whereas when they go into a general bookstore, they act more like a grownup."

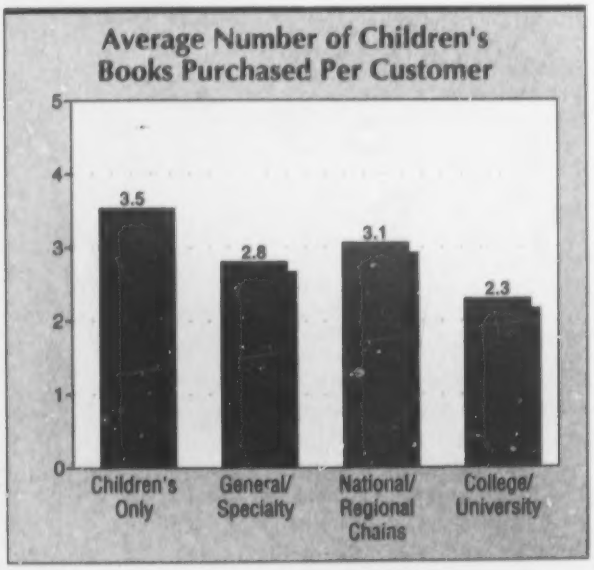
Another important service that booksellers provide is special ordering. Fully 100% of the children's bookstores we surveyed place special orders of children's books for their customers, as do 98.7% of the general independents, 85.7% of the specialty independents, 87.5% of the college/university stores, 90% of the regional chains and 60% of the national chains (see chart, p. 29, for further statistics). As Durrie of The Children's Corner points out, "In order to be service-oriented in the book business, you have to do special orders. They're costly, but they're necessary to build up a relationship with the customer." And special orders make for a steady flow of customers. "People have to come in to order the book," says Joan Hulbert, owner of the Wit & Wisdom bookstores in Cleveland, Oh., "and they have to come back to pick it up. Often they'll buy something else while they're here."

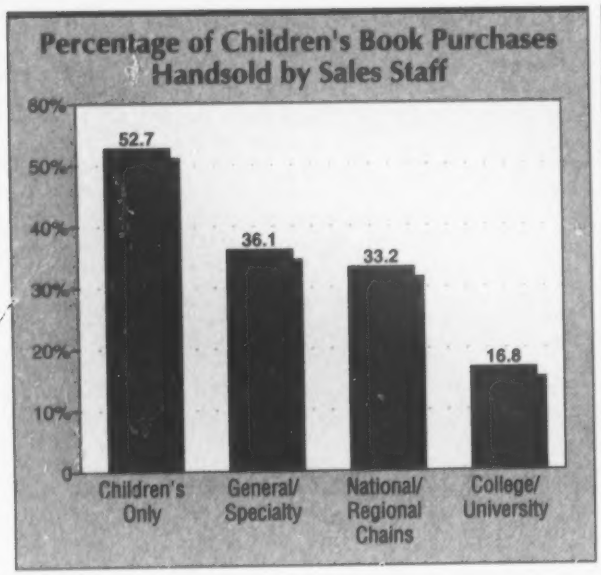


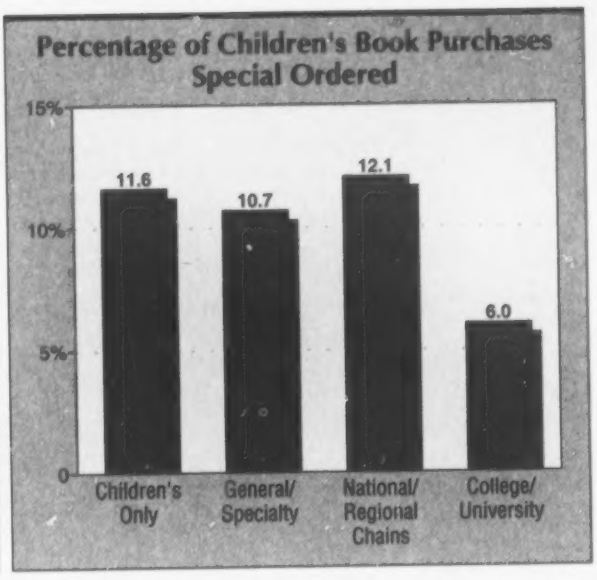
"It's *How* Much?"

Most booksellers we surveyed believe that price resistance for children's books is on the rise. "There has been a big increase in the prices of hardcover children's books," says Betty Miller, manager of the Children's Bookery in Fairfield, Oh. "We're hearing more comments from customers, it sounds like the recession combined with the price increases are to blame." "The increase in prices is down-









right frightening," says an Idaho bookseller. "I'm afraid books are being priced right out of the hands of that large segment of the population that would most benefit from them." And many say that price resistance is directly affecting sales. "Our business volume is down this year," a Texas bookseller reveals, "and we attribute some of the decrease to price resistance. Prices are going up in one-dollar (or more) increments, much above the general inflation rate." Others blame the deep discounts that variety stores and price clubs offer, and say that there's little they can do to compete.

We asked booksellers at what price point customers will refuse to purchase a children's book. This amount was highest for children's-only stores ($19.40), indicating that their customers displayed less price resistance than people buying children's books in other types of stores ($17.45, on average). But price resistance also varies by community and by region, not just by type of store; and it certainly is not felt everywhere. "We don't see a lot of it," says one northern California bookseller. "We're in a fairly wealthy community and people don't seem to cringe, even at the $18.95 picture books."

Booksellers say that parents are much more willing to spend money for books on children younger than 12 years old, rather than over 12. And they're more willing to pay $15 or $20 for the books they'll keep "for posterity," as a California retailer puts it, while they won't spend as much on a new title or an unknown author.

Paperbacks are far and away the format of choice; many booksellers claim that hardcover children's books are largely purchased only as gifts these days. "The vast majority of our customers want paperbacks and lower prices," states an Alaska bookseller. "They'll buy paperback reprints of good children's books rather than expensive hardcovers, unless it's for a special occasion."

"An $18.95 hardcover picture book is a toughy," observes Stimola of A Child's Story. "Even at $17.95, people ruffle a bit. It's a $20 bill by the time you add tax." Anne Underhill, a buyer for the Book Mark in Tucson, Ariz., remarks, "People are looking very carefully. They say, 'It's lovely,' then put it down." But many others insist that customers are still willing to pay for something they perceive has lasting value. "People resist 32 pages of mediocrity," says a North Carolina bookseller. "But if a book is good, there is no price resistance."

Price resistance to children's books might be greater in general bookstores, theorizes Steven Moss, manager of the children's section at Joseph-Beth Booksellers in Lexington, Ky., "because in a general store people make comparisons with adult books. They think even paperbacks should be cheaper because they're for children. People who go into a children's bookstore to buy children's books know what prices to expect."

But no matter what kind of store we spoke with, booksellers of all kinds resent—and their customers complain about—price increases on backlist books, such as *Goodnight Moon* (cited by several). Customers expect backlist books to be cheaper, and get angry when they see the prices going up dollar by dollar.

Signings Sell

In children's stores, author appearances and autographings are far and away the most popular and effective means for promoting children's books (deemed as such by 45.5% of the respondents). Many of the children's booksellers who don't consider book signings effective say that their stores are not located on the usual tour circuit, so holding a signing is often not an option (they voiced much frustration over this, however). Other kinds of stores do children's book autographings much more rarely—they are considered effective by only 19.9% of the non-children's-only respondents.

For children's stores, the next most effective promotions (all of which received similar response percentages of 20–25%) are character appearances, book clubs, story hours and direct mail to customers. Other kinds of stores (26.5% overall, and 38.1% for chains) have the most promotional success with displays: dumps, point-of-purchase and spinners. The majority of other categories garnered rather small percentages from non-children's stores, indicating that on the whole they don't devote much time and energy to promoting children's books.

New children's books have a special display area in 77.3% of the children's stores, and 53.3% of all other stores (58.6% of general/specialty independents, 66.7% of national/regional chains, and 34.4% of college/university stores). "We are very excited about presenting new releases," says Durrie of The Children's Corner. "We put them on the front tables of the store, and we have a shelf in several sections that says 'New Picture Books,' 'New Middle Readers,' 'New YA.' Visibility is hard to replace. Wonderful gems get buried; when we do inventory we are always horrified to

come across books that we forgot about."

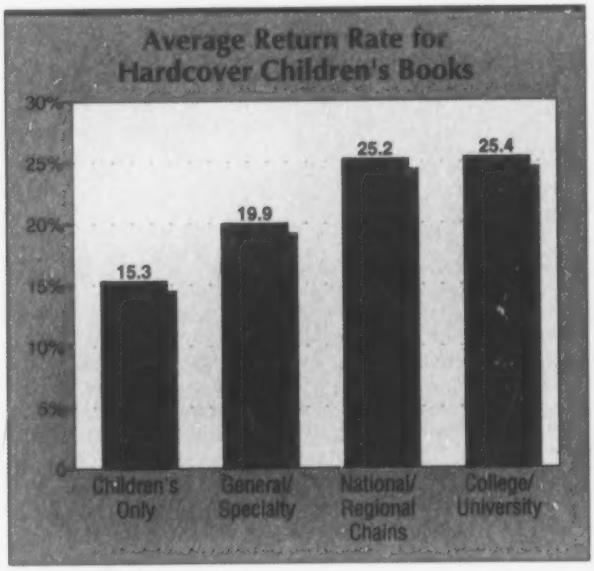
Children's stores also display new releases for a longer amount of time—8.7 weeks, vs. 7.1 weeks in general/specialty stores, 7.8 weeks in college/university stores and 5.9 weeks in national/regional chains.

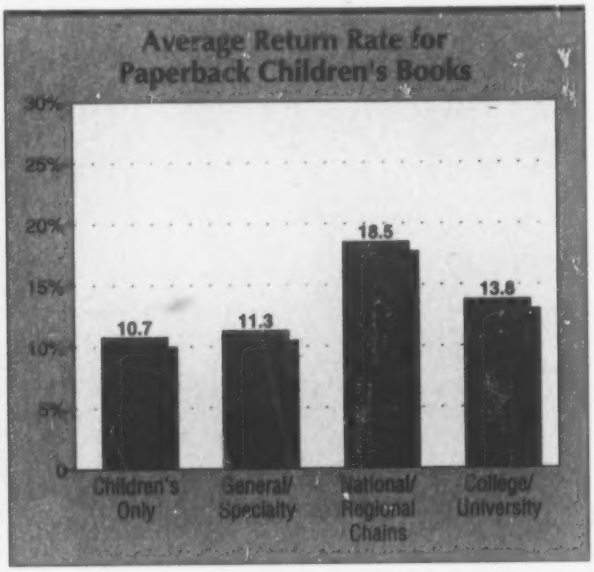
say they are placing more frequent but smaller reorders via computers. ("The wholesalers can get the books out in a day or so," remarks Peterson of Pooh's Corner. "Why can't the publishers?") Of the children's stores, 38.8% reorder from publishers (down from 47.2% last year) and 61.2% from wholesalers; for independents, it's 27.8% from publishers and 72.2% from wholesalers, for chain stores, it's

are perennial sellers have space based on what their turnover is."

Rate of Return

In the category of picture books, there is only a slight difference between children's and non-children's stores in the average amount of time the books are kept before being returned: 9.7 weeks in children's stores, and 9.1 weeks in all other stores. General/-





Shopping Around

When ordering new children's books, children's booksellers purchase 79% of them from publishers and 21% from wholesalers (a slight increase over last year's survey, in which they bought 76.6% of their new books from publishers). Other independent booksellers make initial purchases from publishers 57.2% of the time, and 42.8% from wholesalers; chains purchase 64% from publishers, 36% from wholesalers; and college/university stores purchase 69.5% from publishers, 30.5% from wholesalers.

This percentage for children's-only stores is high, the booksellers say, because they need to see the books before ordering them, and they often don't have this opportunity until the reps arrive with galleys and f & gs. "Publishers' reps who bring the books for me to see will get the orders," states Gurowski of The Children's Pages. Many booksellers say they would love to be able to spend a little time reading the books before a sales call. "A number of our reps leave their proofs overnight or over the weekend," states one Washington, D.C. retailer. "This has been the most useful development in years."

For reorders, booksellers are increasingly turning to wholesalers, and

52.9% from publishers and 47.1% from wholesalers, and for college/university stores, it's 33.8% from publishers and 66.2% from wholesalers.

On average, children's booksellers keep 4.9 copies of each children's title in stock, compared to an average of 3.9 copies for all other stores. The breakdowns vary widely, however: 3.1 copies in general/specialty stores, 2.6 in college/university stores, and 5.8 in chains (6.8 in regional chains, 4.8 in national chains). "Every buyer's goal," says Michael Cavanaugh, merchandise manager for children's books at Barnes & Noble/B. Dalton, "is to have enough overstock to keep the best books in stock, but you don't want to go crazy with it. Books that

specialty stores return picture books after an average of 9.3 weeks, college/university stores return them after 9.1 weeks and national/regional chains after 7.3 weeks. New novels are kept on the shelves slightly longer: 10.7 weeks in children's stores, vs. 8.9 weeks in general/specialty stores, 8.6 in college/university stores and 7.4 weeks in the chains.

Breaking down return rates into hardcover and paperback categories also yields interesting findings (see charts, p. 30). For children's stores, the average return rate is 15.3% for hardcovers and 10.7% for paperbacks. Both of these figures are lower than for every other type of store. General/specialty independents have a return

A PROFILE OF THE CHILDREN'S BOOKSTORES SURVEYED

The children's-only stores we surveyed have an average of 5.6 staff members and have been in business an average of 6.6 years. The largest percentage of these stores (35.2%) are located in strip malls, followed by general commercial areas (27.3%), enclosed shopping malls (9.1%), residential areas (4.5%), downtown locations (4.5%) and outdoor malls (2.3%). Of these locations, 51.1% are suburban, 29.5% are urban and 10.2% are rural. The greatest percentage of stores are in the Pacific region (28.4%), followed by East North Central (14.8%), Mountain (12.5%), New England (10.2%), Middle Atlantic (9.1%), South Atlantic (8%), West South Central and West North Central (both 5.7%).

specialty independents have a return rate of 20% for children's hardcovers and 11.3% for children's paperbacks; in college/university stores, children's hardcover returns are a sizeable 25.4% and children's paperback returns are 13.8%; in chain bookstores, children's hardcovers have a similarly large 25.2% average return rate, and children's paperback returns are 18.5%. Frontlist returns, fairly predictably, are more than twice as heavy as backlist returns, which average well under 10% for all types of stores.

Children's-only stores may return fewer books than other categories of stores, but their returns are rising at a much higher rate than in other types of stores. Just over 20% of the children's stores say that return rates have increased in the last 12 months, compared to 8.1% of all other stores, perhaps reflecting the glut of frontlist that many children's booksellers are bemoaning. Of the stores that report an increase in returns, children's-only stores report an average increase of 22.5%, vs. 19.9% for all other stores.

Booksellers in children's-only stores find publishers' sales reps their most useful source of information when purchasing children's books (cited by 68.2% of respondents), followed by publishers' catalogs (cited by 58%). It was the reverse order for all other types of stores: 65.4% say that catalogs are their most useful source, followed by sales reps (cited by 48.9%). The other most commonly cited sources followed in roughly the same order for children's and non-children's stores: book reviews, word of mouth, articles in trade journals, trade shows and input from staff.

Not only do children's-only booksellers consider sales reps their most important information source, but they also see the highest percentage of reps. These booksellers say that 60.7% of the publishers they buy children's books from send reps to their stores, compared to 40.9% for general/specialty independents, 49.6% for college/university stores and 32.8% for chains. Smaller stores see a much lower percentage of reps: 39.2% of publishers send reps to stores with sales under $500,000, compared to 65.3% to stores with sales over $500,000.

Selling to the Schools

The educational market—selling books directly to teachers and to schools—is proving a growing source of business for children's booksellers, notwithstanding budgetary cutbacks and increasing competition from wholesalers and publishers. Ninety-two percent of children's-only stores sell to schools and teachers, as do 76.3% of the general/specialty independents, 66.7% of the national/regional chains and 40.6% of the college/university stores. The children's booksellers who sell to schools say that 32.3% of their total business is done with teachers and/or schools, up from 29.5% last year. The other categories of stores do roughly half that percentage of business with schools (16.1% for general/specialty stores, 15.2% for chains and 14.5% for college/university stores).

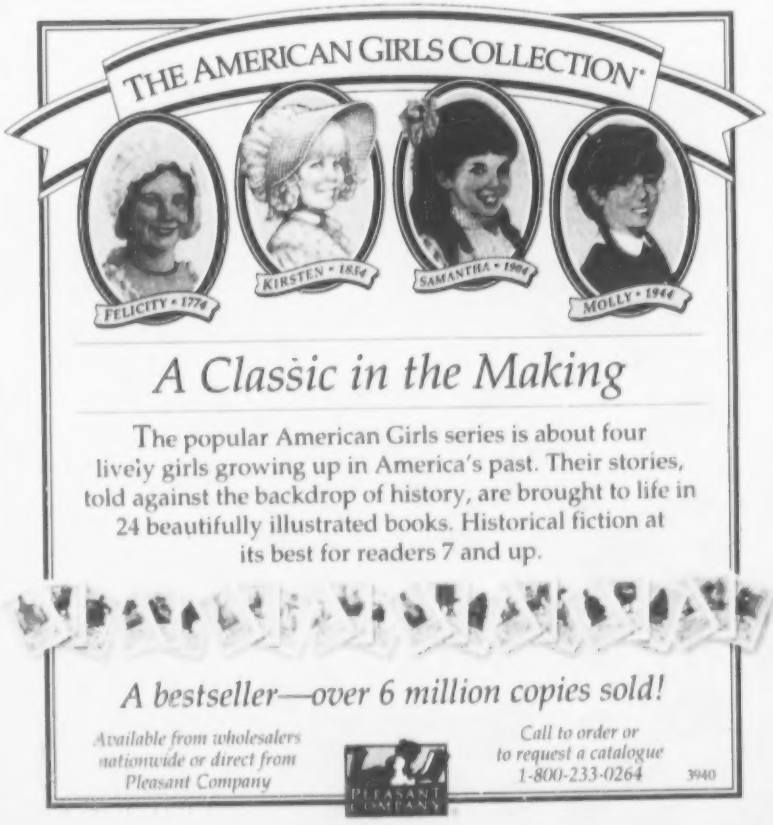
Two-thirds (67%) of the children's-only stores also do school book fairs, accounting for an additional 18% of their business. Slightly more than one-third (36.7%) of general bookstores run book fairs, representing nine percent of their children's book business. The figures are much smaller for other types of stores: 9.5% of national/regional chains (representing 6% of total sales) and 9.4% of college/university stores (4% of total sales).

Prospects Are Bright

The Association of Booksellers for Children's executive director, Caron Chapman, paints an encouraging picture of the future for children's bookselling. "There's much more media awareness of children's bookstores," she says. "People are now expecting them to be part of their community. There might be more competition—maybe four children's bookstores in one community won't last 10 years—but we can expect there to be at least one or two. And to differentiate themselves from superstores and general bookstores increasing their children's inventory, children's booksellers have had to become more creative: in terms of offering services, developing a mail-order business, opening a second location, giving book talks, working with school librarians, and so on.

"We haven't peaked yet, in terms of the number of bookstores, the number of books being published, and consumer demand," Chapman predicts. Demand for children's books should remain high in the coming years; parents who recognize the value of books and are buying them for their children will continue to do so. With the heightened emphasis and attention given to literacy and to reading, and with a still-booming birth rate, children's books and children's bookselling should remain strong throughout the decade.□

If you are interested in obtaining a copy of the survey on which this report was based, please contact Cathy Hoey at (212) 463-6787.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SALES OFFICES

249 West 17th Street
New York, N.Y. 10011
FAX-(212)-463-6653
TELEX-127-703 RR BOWKER

CONTRACTS COORDINATOR
Paul Walker *(212) 463-6604*

NORTHEAST
Lynn Myers *(212) 463-6811*
Jane Belostock *(212) 463-6797*
Patricia Fiore *(212) 463-6809*
John V. Turner *(212) 463-6784*
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MIDWEST
Matthew Hurley *(708) 390-2917*
Cahners Publishing Company
1350 E. Touhy Ave.
P.O. Box 5080
Des Plaines, Ill. 60017-5080
FAX: (708) 635-0929

WEST
Jim Levitt *(818) 764-5101*
Lorna Campbell
7111 Radford
North Hollywood, Calif. 91605
FAX: (818) 982-6387

SOUTH
Robin Mays *(404) 955-6500*
Cahners Publishing Company
6520 Powers Ferry Road, Suite 395
Atlanta, Ga. 30339
FAX: (404) 955-2585

CANADA
Claude Choquette *(514) 348-3236*
The Rights Agency
C.P. 596, Station N
Montreal, Quebec H2X 3M6

FRANCE
Eliane Benisti *33-1-42-22-85-33*
80 Rue des Saints Peres
75007 Paris, France
TELEX: 205715 F ECOLEHS

ITALY
Donatella Barbieri
Agenzia *00392-865645*
Letteraria Internazionale
Via Fratelli Gabba, 3
I-20121 Milano, Italy
TELEX: 321576FAX: 0039-2-876222

JAPAN
Tom Mori *03-230-4081*
Tuttle-Mori Agency
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